APPENDIX B

Application for 2-1-1 Wisconsin Assignment as a 2-1-1 Call Center

please see attached

2-1-1 Wisconsin
DRAFT

APPLICATION FOR 2-1-1 WISCONSIN ASSIGNMENT AS A 2-1-1 CALL CENTER

August 2003

2-1-1 Wisconsin
2059 Atwood Avenue, Madison WI 53704

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2-1-1 WISCONSIN

APPLICATION FOR ENDORSEMENT AS A 211 CALL CENTER

The purpose of the 2-1-1 Wisconsin's *Application for Endorsement as a 211 Call Center* process is to apply the AIRS *Standards for 211 Call Centers* to measure an agency's readiness to establish and operate a 211 Call Center. The process addresses the goals, resources, experience, and plan of the potential 2-1-1 Call Center to ensure quality and consistent 211 service. The process is intended to be a cooperative effort between the applicant and 2-1-1 Wisconsin to establish a strong foundation for 211 on which the applicant can build and grow. Applicants that meet 2-1-1 standards and complete the application process are recommended to the 2-1-1 Wisconsin Board of Directors for 2-1-1 assignment.

THE APPLICATION PROCESS

Application forms can be obtained by calling the 2-1-1 Wisconsin's Larry Olness at 608-246-4381. There is no "deadline" for returning completed applications; however, packets are reviewed in the order received.

Step One:

Organizations interested in applying for 2-1-1 Wisconsin assignment are asked to notify 2-1-1 Wisconsin of their intent to apply. Notification can be sent to the 2-1-1 Board Chair, Larry Olness, larryo@uwdc.org. Once an organization has notified 2-1-1 Wisconsin of an intent to apply, 2-1-1 Wisconsin will assign a liaison to the applicant. The liaison serves as the point-of-contact with regards to any questions the organization might have about the application, standards, or requirements.

Step Two:

Complete the "Application for 2-1-1 Wisconsin assignment as a 2-1-1 Call Center" and submit it (along with three complete copies of all materials) to:

2-1-1 Wisconsin Inc.
2059 Atwood Avenue
Madison, WI 53704

Step Three:

Upon receipt of the application, the packet will be examined for completeness (three copies, each standard addressed, etc.) and a letter of receipt will be sent out within 10 business days. Note that 2-1-1 Wisconsin does not return materials that are submitted as part of an application. Please do not send "originals" or your only copy of a document. There is no "deadline" for returning completed applications; however, packets are reviewed in the order received.

Application packets are evaluated by a 2-1-1 review team. The review team is composed of three members of the 2-1-1 Board of Directors with various backgrounds. At least one member of the team looking at your application will not be affiliated with an agency that is located in the region you plan to service. The 2-1-1 review team members evaluate applications independently and then confer with one another briefly before submitting their recommendations to the full 2-1-1 Wisconsin board. It is possible that a 2-1-1-review team member might telephone or write your designated contact person about questions the team identifies regarding your application before submitting their recommendations to the full board. If you receive a call, please try to respond promptly to the questions, as your answers could help improve our understanding of your application.

Review team members will submit their recommendation to the Board no later than 10 business days before the 2nd Board business meeting following the issuance of a letter of receipt. The Board will vote on the recommendation and if approved, will notify appropiate parties of 2-1-1 designation.

Step Four:

If the Board does not endorse the applicant, notification will be sent with a description of the requirements that need improvement to the applicant. The applicant then has one year to make improvements and demonstrate ability to meet the requirements missed. After one year, the applicant must re-start the application process.

2-1-1 WISCONSIN

<u>STANDARDS FOR 2-1-1 CALL CENTERS</u>

I.   The Call Center shall provide professional information and referral services as described in the *Standards for Professional Information and Referral* published by the Alliance of Information and Referral Systems (AIRS).

> *Requirement 1:*   Call Center applicants not already accredited by AIRS shall be in the process of applying to AIRS for accreditation and shall demonstrate a likelihood that their application will be approved within the next 18 months.

> *Requirement 2:*   The Call Center applicant shall be staffed by at least one Certified Information & Referral Specialist (CIRS)[i] and ensure that all staff responding to caller inquiries are trained in the basic skills needed to successfully execute their duties.

> *Requirement 3:*   Call Center applicants that do not provide formal crisis intervention, shall have protocols and technology to transfer crisis calls to an agency that does.

> *Requirement 4:*   The Call Center applicant shall monitor and evaluate client satisfaction and the quality of its service through appropriate follow-up.

II.   The Call Center shall be accessible by operating on a 24/7 basis, without assessing a direct charge against callers, and demonstrating a commitment to reasonably accommodate callers with special needs.

> *Requirement 1:* The Call Center applicant shall ensure the provision of 2-1-1 service 24-hours a day, year-round. (Allowances and arrangements for service during non-peak hours can differ than peak time operations.)

> *Requirement 2:* The Call Center applicant shall not charge inquirers for 2-1-1 service. NOTE: This refers to the provision of information and referral services, not telecommunication or other charges outside the control of the Call Center, such as access charges.

> *Requirement 3:* The Call Center applicant shall provide barrier-free access to its service for individuals and groups who have special needs, e.g., TDD/TTY access for people with hearing impairments; and translation services for inquirers who speak languages other than English.

III.   The Call Center shall have the tools necessary to adequately support 2-1-1 service.

> *Requirement 1:* The Call Center applicant shall utilize a computerized resource database that contains accurate, detailed, and uniform information about community resources and that is indexed using the <u>AIRS/Info Line Taxonomy</u>.

> *Requirement 2:* The Call Center applicant shall utilize a computerized system for collecting and organizing inquirer data that provides a means for describing requests for service and identifying service gaps.

> *Requirement 3:* The Call Center applicant shall monitor and evaluate the demand, accessibility and efficiency of the 2-1-1 service by using an automated call management system that is capable of measuring such items as: the call volume; call abandonment rate; and average length of call.

IV.   The Call Center shall work to coordinate I&R services in their local community and in the state of Wisconsin.

Requirement 1: The Call Center applicant shall demonstrate knowledge of, as well as coordination with, other community information and referral providers, such as other comprehensive I&Rs, specialized I&Rs, crisis centers, 9-1-1 centers, and 3-1-1 centers, that operate in any part of the applicant's proposed 2-1-1 service area.

Requirement 2: The Call Center applicant shall have developed a protocol for referring callers who want to make a community spirited contribution of money, goods or services – including volunteer hours – to agencies that coordinate volunteers and/or manage donations of money, goods or services.

Requirement 3: The Call Center applicant shall conduct an ongoing program designed to increase public awareness of I&R and 2-1-1 services.

Requirement 4: The Call Center applicant shall strive to strengthen the seamless and uniform delivery of 2-1-1 services state-wide by working collaboratively with all other 2-1-1 Call Centers in Wisconsin and other I&R providers in Wisconsin.

2-1-1 Wisconsin
Application for Assignment as a 2-1-1 Call Center

AGENCY AND PROGRAM INFORMATION

Agency Information

Official Name: _____

Registered Assumed Name(s): _____

_____

Street Address: _____
(Main/Adm Office)

_____

_____, WI _____

Mailing Address: _____
(Main/Adm Office)

_____, WI _____

Voice Telephone: _____ Fax: _____

Website: _____

Agency Administrator: _____ Title: _____

Agency Legal Status:
☐ Private Nonprofit:
   Incorporated: ☐ No   ☐ Yes, year _____

   Tax-exempt under section 501(c)(3) of the Internal Revenue Code:
       ☐ No   ☐ Yes, Tax-Exempt ID Number ____-_____

☐ Governmental Unit:
   Tax-Exempt ID Number ____-_____

   ☐ State of Wisconsin   ☐ County of _____   ☐ Municipality of _____

   ☐ Other governmental unit (specify) _____

☐ Other (specify) _____

Federal Employer Identification Number (EIN): _____

Agency Funding Source(s): _____

_____

Agency Description/Mission: _____

_____

_____

_____

_____

_____

Attach most recent agency annual report to completed application.

Community I&R Program Information

Program Name: _____

Street Address: _____
(Program Main/Adm Office)
_____

_____, WI _____

Mailing Address: _____
(Program Main/Adm Office)
_____ , WI _____

Program Administrator: _____ Title: _____

    Phone: _____ E-mail: _____

Public Contact Points:

    Voice: _____ TTY: _____ Fax: _____

    E-mail: _____

    Current hours of operation: MO _____ TU _____ WE _____ TH _____ FR _____

                      SA _____ SU _____

Year program established: _____

Program budget for current year: _____

Program funding source(s): _____

_____

_____

Primary focus of current program (check only one):
☐ I&R   ☐ Crisis intervention   ☐ Other _____

Primary geographic service area: _____

Population of primary geographic service area: _____

Proposed 211 service area *(include a general description of the area as well as specific area*

codes and/or exchanges): _____

_____

_____

_____

_____

_____

_____

Population of proposed 211 service area: _____

Total number of inquiries in most recent year that has ended: _____ in year _____

Staffing (attach additional sheets as needed):

Attach a current program organizational chart to completed application.

AIRS member: ☐ No   ☐ Yes, Membership number: _____
IRPW member: ☐ No   ☐ Yes

State-Endorsed Multipurpose Collaborative Body:
  Name: _____
  Staff Person: _____
  Telephone: _____
  Mailing Address: _____
                  _____

211 Application Contact:

Print/Type _____   _Title_ _____

Phone: _____   E-Mail: _____

Application Submitted By:

Print/Type _____   _Signature_ _____

Title: _____   Date: _____

Phone: _____   E-Mail: _____

Return completed form to:

<div align="center">

2-1-1 Wisconsin
2059 Atwood Avenue
Madison, WI 53704

</div>

Standard I

The Call Center shall provide professional information and referral services
as described in the *Standards for Professional Information and Referral*
published by the Alliance of Information and Referral Systems (AIRS).

Questions:

Is your information and referral program accredited by AIRS? yes no
  If no,
  Is your agency/program accredited by another body/bodies? yes no
    If yes, list accrediting body/bodies: _____

    _____

    _____

  Has your agency applied for accreditation by AIRS? yes no
    If yes,
    When did AIRS accept your application for review? Date: _____
    Where is your application at in the process and what is the likelihood that
      it will be approved in the next 18 months? (use *Explanation/Comments* box)
    Does MI-AIRS have your permission to confidentially discuss your
      application for accreditation with AIRS? yes no

Explanation/Comments:

Documentation: Copy of AIRS Certificate of Accreditation or copy of letter from AIRS stating that your application has been accepted for review and other correspondences related to its progress. May also submit copy of certificates of accreditation granted by other pertinent bodies, recent program audits, and/or recent program evaluations.

Standard I

The Call Center shall provide professional information and referral services
as described in the *Standards for Professional Information and Referral*
published by the Alliance of Information and Referral Systems (AIRS).

<u>Questions</u>:

Is your agency staffed by at least one Certified Information and Referral Specialist?	yes	no
Does your agency conduct a formal program to train new I&R Specialists?	yes	no

If yes,

Does your training program include pre-service training in basic I&R skills?   yes   no

If yes, does your pre-service training address the following:

1. Interviewing techniques and attitudes	yes	no	Page# _____
2. Listening skills	yes	no	Page# _____
3. Communication	yes	no	Page# _____
4. Proper telephone usage	yes	no	Page# _____
5. Assessment techniques	yes	no	Page# _____
6. Information provision procedures	yes	no	Page# _____
7. Referral provision procedures	yes	no	Page# _____
8. Follow-up	yes	no	Page# _____
9. Data recording	yes	no	Page# _____
10. Maintenance of inquirer records	yes	no	Page# _____
11. Organization of the Taxonomy	yes	no	Page# _____
12. Use of the resource database	yes	no	Page# _____
13. Job-related equipment and tools	yes	no	Page# _____
14. Working with multicultural/ethnic inquirers	yes	no	Page# _____
15. Working with special populations	yes	no	Page# _____
16. Working with difficult inquirers	yes	no	Page# _____
17. Working with people in crisis	yes	no	Page# _____
18. I&R in times of disaster	yes	no	Page# _____

Does your I&R service provide on-the-job training?   yes   no

How many training hours are involved?   _____

<u>Explanation/Comments</u>:
(use reverse side)

<u>Documentation</u>:
(Not necessary to duplicate already submitted documentation.)
Staffing table from the *Agency and Program Information* form and copy of at least one CIRS certificate held by a current staff member. Also include sample orientation schedule, orientation manual, and training curriculum/material.

Standard I:

The Call Center shall provide professional information and referral services
as described in the *Standards for Professional Information and Referral*
published by the Alliance of Information and Referral Systems (AIRS).

Questions:		
Does your I&R service provide formal suicide/mental health crisis intervention?	yes	no
If yes, is your service accredited by the American Association of Suicidology?	yes	no
If no, is there a formal suicide/mental health hotline service that serves your region?	yes	no
If yes,		
What is its name and sponsoring organization?	_____	
	_____	
	_____	
Is that service accredited by the American Association of Suicidology?	yes	no
Does your I&R have an memorandum of understanding (MOU) to connect callers with that service?	yes	no
Does your I&R have protocols for transferring callers to that service?	yes	no
Is your phone system capable of seamlessly transferring callers to that service?	yes	no
If no to any of the above,		
How do your I&R specialists handle crisis calls? (Use the *Explanation/Comments* box below.)		
Does your I&R service have protocols for referring callers to 911?	yes	no

Explanation/Comments:

Documentation: Copy of AAS Certificate of Accreditation or MOU/protocols for transferring calls to a designated suicide/mental health hotline. Also protocols for transferring calls to 911.

Standard I:

The Call Center shall provide professional information and referral services as described in the *Standards for Professional Information and Referral* published by the Alliance of Information and Referral Systems (AIRS).

Questions:

Does your I&R service conduct follow-up to determine:

Client satisfaction	yes	no
Quality of service	yes	no
Does your I&R service have a written follow-up policy?	yes	no
Does the policy address conditions under which follow-up is required?	yes	no
Does the policy specify a percentage of inquiries for which follow-up is required?	yes	no

If yes, what percentage is required? _____

What percentage of total inquiries were followed up last year? _____

Explanation/Comments:

Documentation: Sample of forms used by staff to document follow-up action taken and result of follow-up. Follow-up policy. Management reports documenting follow-up and results.

Standard II:

The Call Center shall be accessible by operating on a 24/7 basis,
without assessing a direct charge against callers,
and demonstrating a commitment to reasonably accommodate callers with special needs.

Questions:

Will your 211 service be available from a live specialist on a 24-hour/7 day basis?   yes   no

What volume of calls do you anticipate, once 211 service is initiated? (use graph below)

Will another agency provide coverage of your lines at any time?   yes   no
  If yes,
  What is the name of that agency? _____
  What are the qualifications of that agency? (use *Explanation/Comments* box)
  Will that agency have access to the same database of community resources used
    by your I&R staff?   yes   no
  When will that agency be providing coverage? (use graph below)
  Will the type of service provided by that agency vary from your own? (use *Explanation/Comments* box)

What staffing levels will you/your partner agency maintain to meet expected demand? (use graph below)

What are your backup plans for periods of heavy demand/short staffing? (use *Explanation/Comments* box)

Shift (modify graph, if your shift hours are different)	7am–3pm, M-F	3pm–11pm, M-F	11pm–7am, M-F	7am–7pm, S-S	7pm–7am, S-S Weekend
Est. call volume					
Supervisory Staff					
Phone Staff					
Support Staff					

Explanation/Comments:

Documentation: MOU with partner agency and description of partner agency service.

and demonstrating a commitment to reasonably accommodate callers with special needs.

<u>Questions</u>:
Are information and referral services available free of charge to all 211 inquirers?　　　yes　　no

<u>Explanation/Comments</u>:

<u>Documentation</u>: Explanation of cost, if any.

Standard II:

The Call Center shall be accessible by operating on a 24/7 basis,
without assessing a direct charge against callers,
and demonstrating a commitment to reasonably accommodate callers with special needs.

Questions:

Does your I&R service have a TDD/TTY for communicating with people
with hearing/speech impairments?   yes   no

Does your I&R service make arrangements for people who speak languages
other than English? (Describe in the *Explanation/Comments* section below.)   yes   no

Explanation/Comments:

Documentation: Relevant protocols and training material. MOUs or other documentation, if services are provided through contract with another entity.

The Call Center shall have the tools necessary to adequately support 2-1-1 service.

Questions:

Does your I&R service utilize a computerized resource database?	yes	no
Does your agency maintain the database?	yes	no
If no, what is the name of the organization that maintains the database?		

_____

What software is used to operate the database?	Refer	____
	Iris	____
	Direct/Direct Win	____
_____, other Commercial I&R Application		____
Custom I&R Application		____

Is the database management site a partner in the Early On Statewide Database Project? yes no		
Do records in the database follow a uniform profile?	yes	no
Does the profile include:		
A unique record identification number?	yes	no
The legal name of the organization?	yes	no
Other names by which the organization is known (popular names, former names, etc.)	yes	no
A description of the legal status of the organization? (nonprofit, for-profit, government, etc.)	yes	no
Federal Employer Identification Number (EIN)?	yes	no
Street addresses?	yes	no
Mailing addresses, where applicable?	yes	no
Telephone numbers, including TDD/TTY and fax?	yes	no
A description of services provided?	yes	no
A description of eligibility requirements?	yes	no
A description of the application process?	yes	no
The date the information was last verified?	yes	no
Does your software support the AIRS/Info Line Taxonomy by:		
Allowing users to search the Taxonomy level by level?	yes	no
Allowing users to specify that they want to search for all records indexed to a selected term and *all of the lower level terms on the same branch of the hierarchy*?	yes	no
Allowing users to do a keyword search of Taxonomy terms?	yes	no
Does the keyword search include Taxonomy 'use' references (synonyms)	yes	no
Are records in the database accurately and consistently indexed using the AIRS/Info Line Taxonomy?[1]	yes	no
When available, are 'Facility Type' terms used?	yes	no
Is 'double indexing' (indexing using terms at multiple levels within a single branch of the hierarchy) avoided?	yes	no
Does the database management site keep their copy of the Taxonomy current by incorporating updates issued by Info Line?	yes	no
Is the database updated regularly:		
Is basic contact information for all records updated at least annually?	yes	no
Is core service information for all records updated at least annually?	yes	no

[1] For guidelines on 'accurate and consistent' indexing, refer to "Indexing with the AIRS/Info Line Taxonomy of Human Services" by Margaret (Gillis) Bruni, in vol. 17 of <u>Information and Referral, the Journal of the Alliance of Information and Referral Systems</u>.

Explanation/Comments:

<u>Documentation</u>: Sample profile of database entry. Sample database entries (such as a directory or survey document). Printout of all terms used to index the database in code order (one copy only). A printout of the service index to the full resource database (one copy only).

Standard III:

The Call Center shall have the tools necessary to adequately support 2-1-1 service.

Questions:

Does your I&R service use a computerized method for recording
inquirer data at the point of contact?

Does the data collected: yes   no

  Allow identification of service requests?

    Allow identification of service requests by ZIP code?   yes   no

  Allow identification of gaps in service?   yes   no

    Allow identification of gaps in service by ZIP code?   yes   no

                                                                                yes   no

Explanation/Comments:

Documentation: Sample inquirer data collection form. Sample system generated management reports.

<u>Standard III</u>:

The Call Center shall have the tools necessary to adequately support 2-1-1 service.

<u>Questions:</u>

Does your I&R service have an automated call management system?   yes   no
  If yes,
  What is the name of the system and the company that owns it? _____

_____

  Is the system capable of measuring:
    Call volume?   yes   no
    Call abandonment rate?   yes   no
    Average length of call?   yes   no
Are reports generated from the system on a regular basis and evaluated?   yes   no

<u>Explanation/Comments</u>:

<u>Documentation</u>: Basic literature about call management system and features (such as a marketing brochure or preface to user guide). Sample call management system reports (reports submitted with test, not actual, call data permitted.)

Standard IV:

The Call Center shall work to coordinate I&R services in their local community and in the state of Wisconsin.

[black redacted bar]

Questions:

Who are the other major community information and referral providers in your proposed 211 service area? (Attach a list that identifies the type of provider, such as Child Care Resource and Referral Agency or Senior I&A/R, and the provider's name/contact information.)

Does your I&R service have defined working relationships with these providers? (Use the *Explanation/Comments* section below to describe relationships.)

Does your I&R service have written protocols for referring inquirers to these providers?   yes   no

Will your 211 Call Center be set up so that inquirers can opt to be automatically transferred to any of these providers from the main menu?   yes   no

If yes, which agencies will be listed on the 211's main menu of options? (use *Explanation/Comments* box below.)

Have the relevant state-endorsed multipurpose collaborative body/bodies endorsed your agency's plan to initiate 211 services in your area?   yes   no

Explanation/Comments:

Documentation: MOUs, contract, or other agreements that documentation cooperative working relationships. Protocols for making referrals to other I&R providers. Copy of MPCB endorsement.

Standard IV:

The Call Center shall work to coordinate I&R services in their local community
and in the state of Wisconsin.

Questions:

Are there agencies in your proposed 211 service area that coordinate
volunteers in the community?   yes   no

Are there agencies in your proposed 211 service area that manage donations of
money, goods or services?   yes   no

Does your I&R service have formal protocols for referring inquirers to these agencies?   yes   no

Will your 211 Call Center be set up so that inquirers who wish to make a donation
can opt to be automatically transferred to an appropriate agency from the main menu?   yes   no

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Explanation/Comments:

Documentation: Relevant protocols. Text and options of Call Center welcome message.

Standard IV:

The Call Center shall work to coordinate I&R services in their local community
and in the state of Wisconsin.

Questions:

Does your agency have a plan to increase public awareness of I&R and 211 services?   yes   no

   If yes, what is that plan? (Summarize using the *Explanation/Comments* section below.)

Does your agency have a budget to support I&R/211 public awareness activities?   yes   no

   If yes, what is the budget?   Year 1   _____

                              Year 2   _____

Will your I&R service routinely collect data about how inquirers heard about
your 211 service?

                                                                              yes   no

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Explanation/Comments:

Documentation: Copy of marketing plan/budget. Copy of intake form with relevant section highlighted.

Standard IV:

The Call Center shall work to coordinate I&R services in their local community and in the state of Wisconsin.

Questions:

Is your I&R service a partner in the Early On Statewide Database Collaborative?[1]   yes   no

Has your agency contributed data to the Early On Statewide Database?   yes   no

Is your agency committed to supporting decentralized, coordinated development of
a comprehensive statewide database of community resources?   yes   no

Is your agency committed to participating in efforts to develop a uniform tool for
211 centers to use to collect statistics on the number of inquires to 211 centers,
inquirer demographic/service needs, and outcomes data?   yes   no

Is your agency committed to developing support for 211 centers in adjacent
service areas?   yes   no

Is your agency a member of the Information and referral providers of Wisconsin??   yes   no
yes   no

Explanation/Comments:

Documentation: